



DOKMEE®

LEARN THE SELLING POINTS OF THE PRODUCT

The Ultimate DOCUMENT MANAGEMENT SOLUTION

Dokmee is a secure, easy to use web based document management system designed for a variety of purposes including document capture and storage, search and retrieval, and file sharing.

Dokmee adapts to any business model by maximizing accessibility and functionality in repositories of all sizes, while increasing collaboration and communication between users.

- Web
- Cloud
- License Subscription
- Mobile
- SDK for custom integrations



Pricing Model

2 server types, enterprise vs professional

Concurrent licensing

Modular system

Mobile App is free

Pricing is obtained through All Scan

Annual Maintenance and Support (AMP)

All new licenses include 1 year of Maintenance and Support.

AMP covers phone, email & live chat support, bug fixes and software updates

Continued Maintenance and Support is optional and does not impact the function of the software itself.

The cost to renew AMP is 20% of the **current retail price of the software at the time of renewal**.

There is a 20% reinstatement fee charge to renew if AMP is more than 30 days expired. Calculated as 20% of the total AMP cost.

If AMP lapses the end user must pay for the period of time lapsed at time of renewal.

Trials & Upgrades

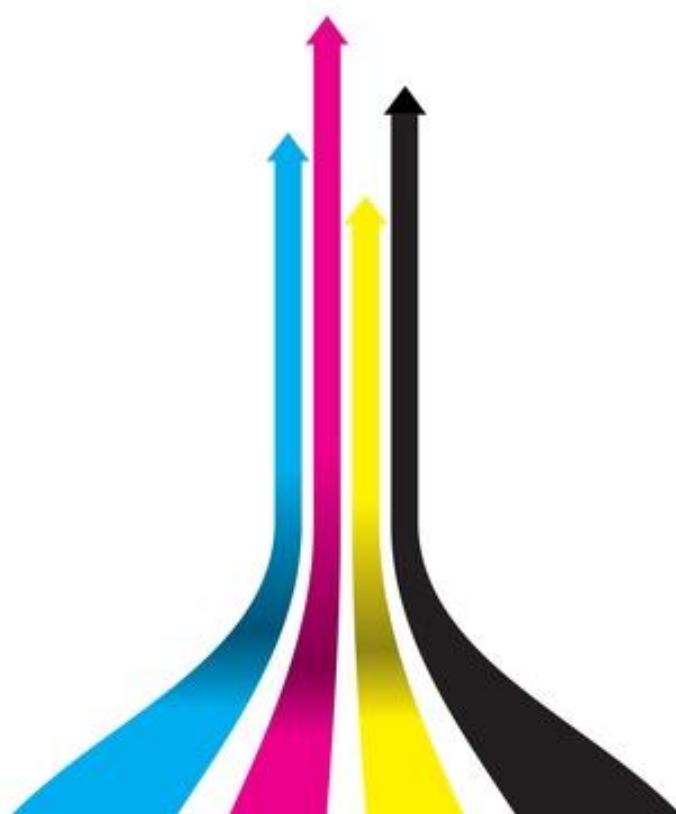
FREE TRIAL

- Fully functional free trial available from the website
- Free cloud account available from www.dokmeecloud.com
- Free mobile application

UPGRADES

- When upgrading from Professional to Enterprise edition **no installation is needed**, just a new license key.
- When adding a module **no installation is needed**, just a new license key.
- Work will not be lost since data is stored in SQL and the images are stored in a folder on the network. If you switch to a different SQL or Repository, then you will no longer see the old data in your system.

How to Identify your Vertical Market Needs



- Identify the paper intensive area
 - What departments would have the most paper
 - Cost per square footage
- Labor Intensive and approval
 - Identify those departments and analyze the needs
- Identify which module is most important to that vertical
 - Account Receivable
 - Human Resources
 - Student Records
 - Etc...

How to Identify your Vertical Market Needs

- Develop a presentation that demonstrates their needs
- Develop a trust factor
 - You concerned about their current situation and want to help
 - Its not just a sale but a long term relationship
- Preaching the message
 - Trainings
 - Lunch and Learns
 - Participation in specific vertical market seminars / conference.

Why use a DMS?

Can each member of your group quickly find any relevant document created by any other group member?

If not, how long does a typical ***document quest*** take?

Can you call up a list of documents and, simply by looking at the list, know the nature of each?

Can you quickly sense the content?

Can you control who can see each document? And who can edit?

Do you have a detailed record describing every action taken by every user on your system with respect to every document in your repository?

Can you quickly locate any document in your department associated in any way with a key word, like an invoice line item?

Document Management – What Are The Benefits Versus Simply Saving On A Server?

Documents can be easily scanned, faxed or emailed directly into and out of the document management system

Instead of “drilling down” through file directories, a DMS allows you to search and find documents in seconds.

Scanned documents containing typed data will go through an optical character recognition (OCR) conversion making their text searchable

Controls and logs all changes/access to a document

Creates and manages templates to ensure everyone is using the current version

Locks files to prevent simultaneous changes to a document

Support searching document text using AND/OR logic statements and the use of wildcards

Allows security administration at the DMS admin level versus the server (IT) admin level

Immense toll on email servers

- 6MB file mailed to 8 interested parties means 56MB of storage required on various servers (including that of the person that sent the file)

Challenges



Volume of data doubles every 3-5 years

Large backlog

Lack of document revision control

- Documents may be redundant and out-of-date, creating a huge maintenance problem.
- Documents are scattered throughout the organization.

Content exists in varying formats:

- Standard A4, Office Documents, PDF's
- Images, Video, Audio, Autocad Drawings
- Email, Electronically submitted forms

Statistics by Gartner Group

Most office workers lose up to 500 hours a year looking for documents.

On average, professionals spend 50% of their time looking for information.

The average organization:

- Spends \$20 in labor to file each document.
- Spends \$120 in labor finding each misfiled document.
- Loses 1 out of every 20 documents.
- Spends 25 hours re-creating each lost document.



Capabilities of a DMS

FIND: Find documents and files in seconds rather than hours.

SHARE: Allow more than one worker access to the same document at the same time.

VERSION CONTROL: Version control gives you the ability to manage document changes and revisions--including going back to a previous version of a document.

CENTRALIZATION: Store department or workgroup documents in a central storage area.

SECURITY: Set document security for who can view and update files.

AUDIT: Verify who viewed and made updates to documents.

ARCHIVING: Set retention periods for documents, and schedule archival or removal processes.

Why it is not being used?

Lack of awareness.

Users are afraid of changes.

Engagement of staff from different departments

Take up of training – requisite basic ICT skills

Initial Cost

Users resist adopting the new systems.

No incentives from the management.



Document Management – So how do I justify this and what is the ROI?:

Reduced costs

- Save on hard costs (paper, copier/printer supplies, file cabinets, floor space, offsite storage)
- Administrative staff time
 - Looking for information/files, Faxing, Processing, refiling

Improved Efficiencies

- Administrative staff time
- Increase the accessibility and search-ability of information

Improved Customer Service

Compliance

When fully implemented this configuration and use of document management systems can be replicated at any level in an organisation with minimal increase in costs.

Access from Remote locations

Selling Points: VALUE not PRICE

Remember price is not a selling point, but value is.

Regardless how low the **price** of your product is, if you cannot show the **VALUE** it provides to the customer they will not be willing to buy it.

If you are on the higher end of the spectrum on **price**, that does not mean you cannot convince a customer to buy. You need to make sure and show the **VALUE** the product brings to the table:

- Accessibility
- Security
- Efficiency
- Accountability
- Versatility

Selling Points: ACCESSIBILITY

ACCESS files from anywhere at any time

- Centrally located repository
- Access from local intranet or web based internet
- Multiple users can access and view files at the same time
- Easy keyword index searching and full text searching based on document content to find files quickly
- With an easy to use Windows like folder structure, manually and automatically sort files into an unlimited number folders and levels.

Selling Points: SECURITY

SECURE system access

- Group and User access roles
- Define rights at the File Cabinet, Folder, and File level
- Active Directory Integration

SECURE File Encryption

- All files imported and created with Dokmee are encrypted on the server to ensure that accessibility is restricted to authorized Dokmee users only.

Selling Points: EFFICIENCY

EFFICIENT built in Workflow

- Reduce approval processing wait times with:
 - Individual user inboxes accessible from web and mobile app
 - Email notifications and reminders
 - Quick one click viewing and approval process
 - Automatic document routing based on specified rules

Easy to navigate user interface with a focus on EFFICIENCY and functionality

Built in viewer for quick and EFFICIENT access to view files all from one location

Built in integration tools for importing, indexing, searching for files ensure optimal EFFICIENCY during daily business processes.

Selling Points: ACCOUNTABILITY

ACCOUNTABILITY for what is being done in the system

- System Audit log records all system changes to file cabinets, settings, user accounts, and tracks system access.
- File Audit log records all actions and access to individual files and documents.
- Workflow history log tracks and records the life cycle of each document within the workflow.
- Other system processing logs to track and record status of services being run and errors being logged in the system.

Selling Points: VERSATILITY

Licensing structure provides for more **VERSATILITY** and more cost effective usage of the product.

- Licensing with add-on modules allows you to use modules and processing functions from any workstation.
- Several licensing options and version provide scalability to meet your needs.
- Unlimited Read Only portal provides an option for configuring a more budget conscious system for a large number of users.
- Moveable licensing provides the ability to deactivate a license on one station and activate on another.

Enterprise or Professional Edition?

How do you know when to sell Dokmee Enterprise edition versus Dokmee Professional edition?

Clients should purchase Enterprise edition when one or more of the following applies:

- A. Client needs **active directory integration**...
- B. Client needs **Auto OCR or Auto Backup**...
- C. Client needs **folder or file level user restrictions**...
- D. Client needs **version control when editing files**...
- E. Client needs **SDK**...

Dokmee DMS or Dokmee Capture?

How do you know when to add Dokmee Capture licenses to a Dokmee DMS purchase?

Usually, we add at least 1 Dokmee Capture license to a Dokmee DMS purchase when one or more of the following applies:

- A. Client needs to scan and index more than **100 documents/file folders per day...**
- B. Client needs to scan more than **2,000 pages per day...**
- C. Client needs any type of automated **zone recognition** or **barcode recognition...**
- D. Client needs to spread out and split up the scanning and paper conversion process amongst multiple people in a workflow type environment...

Qualification Questions

Know what to ask to properly qualify a deal and to properly recommend license structures.

1. How many concurrent licenses do you need?
2. Is Workflow part of your requirement?
3. Do all of your users need full access or do some only need searching and viewing access?
4. Are all of your users at the same location and on the same network?
5. Do you want or need web access to your files?
6. What level of security do you require? (File level vs Cabinet level)
7. How many pages and documents do you think you will be scanning per day?
8. Do you need any type of special automated indexing and data capture: barcode recognition, zone OCR, database lookup, etc...?
9. What brands and model scanners do you have?
10. What is your budget?
11. What is your timeframe for purchase and implementation?
12. Are you the final decision maker?
13. Is your final decision going to be based on functionality and features, or pricing, or a combination of both?